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ABSTRACT

Although there are more than 140,000 partnerships between business and education in the United States, few have effected fundamental educational change and few have had any impact on economic well-being. Having studied those partnerships that have focused on fundamental educational change, the National Alliance of Business identified what business needs to know and do in order to establish new partnerships that can help overcome the deepening crisis in education. The following are recommended components of educational restructuring: (1) school-based management so that management is shifted from the district to the building; (2) new professionalism among administrators and teachers; (3) revision of curriculum and instruction; (4) new measures of accountability of teachers, administrators, and management performance; and (5) linking education and the social services essential to the quality of a student's education. Business can offer schools management analysis and improvement, advocacy, staff development, research and development, and the application of new technology. Among the common ingredients of successful business and education partnerships are identifiable leadership, broad vision translated into practical objectives, ongoing structure, and an agreed-upon plan of action. (The document includes a 52-item bibliography and a list of persons interviewed to collect information for this report.) (CML)

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A BLUEPRINT FOR BUSINESS ON RESTRUCTURING EDUCATION

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A BLUEPRINT FOR BUSINESS ON RESTRUCTURING EDUCATION

NATIONAL ALLIANCE OF BUSINESS

PREFACE

If a company continually failed to meet consumer needs, it would inevitably be faced with one of two options: 1) declare bankruptcy and close its doors or 2) carry out a top to bottom reorganization or restructuring of its management and operations. As the world around them has changed, our schools have found it increasingly difficult to meet the needs of their consumers—students and, ultimately, the economy and society. Declaring bankruptcy and closing the doors is not a feasible option for public education, except perhaps for a very limited number of schools. Schools must instead change how they manage themselves and conduct their business in order to put the emphasis on performance. Every element, function, and practice needs to be scrutinized for possible improvement.

Restructuring is never comfortable. Just ask any business person who has undergone the upheaval. Restructuring is a risky and costly venture, fraught with difficulty. But schools, like successful businesses, must see change as an opportunity, not a threat.

Unlike most companies, schools need not and should not have to face restructuring alone. All of us—business people, educators, parents, political leaders, community leaders—have too much of a stake in the ultimate success or failure of our schools.

All of us must help. ***A Blueprint for Business on Restructuring Education***, though written primarily for business, is written for anyone concerned about education. ***A Blueprint's*** purpose is to inform business about how it can organize and be involved at the state and local level to help restructure education. It is intended to familiarize business with the issues and concerns of education and with what we need to know and need to do. It explains the elements of restructuring and the kinds of actions that educators, business, government and community leaders should pursue together as partners. The Alliance is convinced that new kinds of joint ventures between business and education are needed—ventures unlike most of the business/education partnerships that already exist.

A Blueprint for Business on Restructuring Education focuses on the early steps business must take if it is to help bring about systemic educational change. It focuses on what the Alliance has learned in the communities and states where business has acted to help restructure the schools. In each case, business people, working together, have laid a solid foundation for the long-term efforts that are required to make fundamental educational change. This report draws from those experiences and captures the key elements of their actions.

The National Alliance of Business believes that as a nation we must make education a priority. Education is not only a problem in local communities and states, but a national problem. Business must make a long term commitment as a partner to ensure that education is a national priority and that we achieve equity, quality and excellence. Not only is the health of our businesses at stake, but so is the health of our society.

The National Alliance of Business hopes that this report and other papers that form our ***Corporate Action Package*** on education will assist in mapping out the strategies and approaches that are needed for business to help make fundamental changes in American education.

William H. Kolberg
President
National Alliance of Business

September 1989

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A Blueprint for Business on Restructuring Education was researched and written by Frederick S. Edelstein, Senior Policy Fellow, with assistance from Esther F. Schaeffer, Senior Vice President for Policy, and editorial support from Richard J. Kenney.

TABLE OF CONTENTS

Executive Summary vii
Introduction 1
Restructuring America's Schools 3
  Five Components of Restructuring 3
What Business Has to Offer 7
Building a Comfort Zone 13
  An Education Gap 13
  Barriers to Getting Started 13
  The Learning Process 16
  Orchestrating the Process 17
  A Rite of Passage 18
Taking Action—The First Steps 19
  Establishing an Ongoing Structure 20
  Developing an Action Plan 21
  Choosing a Focus 21
  Taking a Risk for a Good Cause 23
  Taking a "Lone Ranger" Approach 25
  Recognizing Patience as a Virtue 26
Formalizing the Business Commitment 28
Conclusion 30
Appendices 32
  Persons Interviewed 32
  References 35

Executive Summary

Much has been written about the crisis in education. Far less has been written about how we can overcome it. And even less has been written about the roles business can and must play to increase the pace of systemic educational change. It is clear that new kinds of joint ventures between business and education are required, but what these ventures are and how to build them are not well understood.

A Blueprint for Business on Restructuring Education focuses on how business needs to organize and become involved at the state and local levels in order to forge these new ventures for systemically changing education.

While there are over 140,000 business/education partnerships in the United States, few have effected fundamental educational change. Few have had any impact on American business' well-being. By studying those ventures that have focused on fundamental education change, the Alliance identifies in *A Blueprint* what business needs to know and do in order to establish these new ventures and take action. While there are barriers that separate education and business, *A Blueprint* points out that there is also common ground on which to build.

"If a health epidemic were striking one-fourth of the children in this country. . . , if we had heaps of garbage on the curb, a national emergency would be declared. But when hundreds of thousands of students leave school every year, shockingly unprepared, the nation remains far too lethargic."

Ernest L. Boyer, President
Carnegie Foundation for the Advancement of Teaching

The Deepening Crisis

The strength of the American economy rests on the strength of America's public schools. While this simple statement of fact is gaining growing acceptance among business leaders, the full extent of its ramifications is not fully appreciated.

The relationship between America's public schools and our nation's economic well-being has not always been so apparent. In 1950 only 57.4 percent of American students graduated from high school. Americans saw little reason to worry. Those who did not graduate could still find jobs and lead productive lives. This is no longer the case.

Escalating workplace requirements have totally changed the environment. Couple this with a slower population growth that reduces the labor supply, and employers must reach deeper into the worker pool to those who are less well educated. Unfortunately, employers are doing so when they need workers with higher skill levels, who can adapt to constant change, and can reason and communicate. Examples abound about the gap between the qualifications of new workforce entrants and job requirements. The costs to business of an ill-prepared workforce are staggering and afflict businesses wherever they turn.

Costs of an Unprepared Workforce

- Recruitment costs skyrocketed as 86 percent of 22,900 of a telephone company's applicants failed entry-level proficiency in English and problem solving.
- An insurance clerk authorized paying $2,200 on a $22 claim because she did not understand decimals.
- A steel mill employee ordered $1 million of the wrong parts because he could not understand written instructions.
- An electronics firm spends an average of $250 per employee to train U.S. workers in quality control techniques while it costs its Japanese competitor 50 cents to prepare their average employee; that same U.S. company will spend $30 million over the next five years on remedial education.

These factors affect our competitive position. While many Americans focus on our trade and budget deficits, we will in fact need to turn far greater attention to the education deficit if we are to resolve our domestic and international economic problems.

Restructuring America's Schools

The reasons for our education deficit are complex. Conditions have changed rapidly in the world outside the school walls, and society, including business, has done little to convey the implications of these changes to the nation's educators. All sectors shoulder some responsibility for the crisis, but most importantly, all—business people, educators, parents, political leaders, community leaders—need to assume responsibility for overcoming it.

The fact is that we have maintained an approach to education that is patterned after the 19th century mass production approaches of industry. We have tended to treat all children as though they were the same. Those that can respond to this approach to learning succeed. Many do not.

"...while we have all been preoccupied with the twin deficits, budget and trade, a third deficit has developed that is more ominous in the long run. The deficit in highly motivated, well-trained people that will be required to provide a competitive world class work force."

James Burke
Retired Chairman of the Board
Johnson & Johnson

Young people with different interests and backgrounds need to learn in different ways in different settings, or at different ages, but they can and should still acquire the same foundation of knowledge and skills. Our failure to educate so many children well has more to do with how we answer four critical questions: what should we teach, how should we teach, when should we teach, and who should teach, and far less to do with the children themselves.

The common ground between business and education begins at this point, because when faced by crisis and the need to restructure, business has had to rethink the answers to the questions of what work is done, how, when, and by whom. Educators must now do the same. Like business people, they must rethink organizational structures, styles of management, personnel and financial practices, staff roles and responsibilities, and training practices.

The Alliance has identified five components of education restructuring—components that address the key questions of what, how, when, and who. Business, in collaboration with education, has roles to play in all five areas. These include:

- **School-based management** (school-site management)—School-based management changes the way schools are governed and managed. Decisions are shifted substantially from a central office to professionals at the school site who better understand what their students need.
- **New professionalism**—As authority is shifted to the school site and as teachers work to adopt new teaching approaches, administrators and teachers will need new training and development opportunities. They will also need new policies for flexible staffing arrangements, career ladders, and professional recognition.
- **Curriculum and instruction**—Revising and rethinking curriculum and methods of instruction are the backbone for examining what is taught and how it is taught.
- **Accountability**—Accountability in education has largely been limited to measures of academic achievement, and primarily students, not teachers and administrators, have been held accountable for academic performance. Additional measures are needed for teacher, administrator, and management performance.
- **Linking education and social services**—Given the deep-seated social and personal needs of students, schools and social service providers must be closely linked. Social service agencies are like suppliers to a company and are essential to the quality of a student's education.

What Business Has to Offer

While education and business are very different, many aspects of business and the restructuring it has recently undergone are applicable to the education environment. In particular, business' knowledge and expertise can assist educators in five functional areas:

- **Management Analysis and Improvement**
  —Initiating restructuring
  —Developing goals and objectives
  —Conducting analysis and planning
- **Advocacy**
  —Building coalitions and partnerships
  —Leveraging support
- **Staff Development**
  —Improving teacher and administrator capabilities
- **Research and Development**
  —Fostering creativity and new approaches
- **Application of New Technology**
  —Applying new technology

Building a Comfort Zone

The Alliance's research has found that for business people to press for and support fundamental changes, they must build a very different relationship with educators than they have had previously. They must understand educational issues and problems. They must build levels of trust and credibility with educators and vice versa. Each must overcome misconceptions about the other. Building a comfort zone means business people must take the time to learn about education. Then, they can take action.

Of utmost importance, the learning process should be a group effort. Rarely can individual companies be effective if they act alone. Business people must work together. Additionally, wherever possible, business people should invite educators and other community leaders to join them in their learning process. Earlier "feel good" efforts were generally not characterized by this collaboration within the business community or the community at large.

The learning process has generally included three components:

- Business obtains a first hand perspective visiting schools to observe the physical plant, work conditions, and the learning environment.
- Business experiences education's organization and politics in action by observing state or local education board meetings, legislative hearings, and city council meetings.
- Business people study national, state, and local education issues by engaging education experts and reviewing research and other reports.

Where the learning process has been most successful, it has not been ad hoc. It has been orchestrated and staffed, usually by an existing business or civic organization; sometimes a new one is created.

Taking Action—The First Steps

During the learning process, the participants will have identified a broad spectrum of education issues and problems that need attention. In order to maintain momentum and take action, the partnership needs to develop a process and plan to identify and implement its priorities—what systemic changes should be made.

Through its research, the Alliance identified the critical ingredients that are common to successful partnerships. Similar ingredients have been identified by the social policy research firm Public/Private Ventures in an independent evaluation of the Alliance's twelve city business/education compact project. These ingredients are:

Identifiable leadership. In the sites that are most successful in entering the implementation phase of education restructuring, an effort is made to identify those who are committed to substantial reform over the long term, and steps are taken to shore up areas where additional support appears to be necessary. It is important to have leaders from business, education, government, and the community and not simply their representatives.

Broad vision translated into practical objectives. Business people and their partners need to take the time to develop together a broad vision of what they hope to achieve. They need to translate their vision into practical actions and engage in a joint effort to identify school strengths and weaknesses to determine their focus.

An ongoing structure. Significantly, successful business/education ventures recognize the need for some ongoing structure(s) to orchestrate action and keep the key leadership engaged. Staff in this entity, which is usually very small, have to be credible to and trusted by all parties.

Agreed-upon plan of action. Successful partnerships develop clearly written statements of goals, objectives, timetables, and performance measures. They further establish a mechanism for reviewing progress and refining plans as they proceed.

If business people are to be successful in eventually fostering fundamental educational change, they should be mindful of three points. They should:

- act collaboratively, not alone; avoid acting like "lone rangers."
- recognize that patience is required; the blueprint for change takes time to evolve.
- understand that the open and political nature of education makes change public and risky.

Finally, companies should institutionalize their involvement from within. Key company leadership particularly, the CEO, must convey commitment and stimulate involvement throughout the company. Education change should be seen as a management objective and included in company planning, appraisal and review, and recognition structures.

Conclusion

The responsibility for ensuring that restructuring is not a fad but a reality lies in part with this nation's business leadership. Business has much to offer the public education system. Once convinced of the quality of restructuring plans, business can support schools to improve management, planning, accountability, curriculum, instruction, linkages to social services, and staff development. Business can become a vital advocate for public education. But this will not happen unless business people become a part of the analysis and decision-making process.

For this to occur, educators must more actively engage business in joint ventures. And business leaders and their companies must be prepared to make long-term commitments.

While ***A Blueprint*** focuses on how business needs to respond at the state and local level, business also has a vital role at the national level to ensure that education is placed high on the nation's agenda.

There is no magic bullet. Each enterprise of change, whether on the national, state, or local level, requires the knowledge and understanding of the personalities, politics, bureaucracy, and needs of each community. A team approach is needed to bring the necessary human, technical, and financial resources together to address the needed systemic educational changes.

We need to rely on our American ingenuity to improve and reshape education. It is up to business people, governors, state legislators, chief state school officers, parents, teachers, administrators, board members, and the community at large to face the challenge of making the public education system more productive for this nation's future needs. The purpose of schooling is not solely to prepare a workforce but also to foster learning that enriches all people and helps them flourish and function intelligently. If we are successful in doing this, then we will have shaped tomorrow's workforce into an enlightened and productive citizenry.

> ***"Business was an integral part of the Education Improvement Act. They were in it from the beginning. The Act was not government trying to sell education improvement but a partnership for the good of the citizens of South Carolina."***
>
> *Richard Riley*
> *Former Governor of South Carolina*

INTRODUCTION

We live in an age when more skilled workers are needed, yet the pool of skilled prospects is drying up. Not only has the birth rate dwindled, but more and more of the products of American public schooling are ill-prepared to meet the challenges of the workplace. In many localities, an alarming number of children fail to complete requirements for graduation, and those who do graduate often have insufficient higher order skills necessary for the workplace.

Today's debate centers on the changes that need to be made to improve the system of public schooling, which is increasingly troubled by the trying demands of providing a quality education to *all*, at a time when a growing number of students are economically disadvantaged.

The questions that debate raises, and the solutions it seeks, have a direct impact on American business, which is struggling to compete in a global economy.

If American schools fail to succeed, then it will be left to American businesses to pick up the tab. By 1995, it is estimated that some 14 million Americans will be unprepared for the jobs available. That translates into a disturbing bottom line: lost productivity, reduced product quality, exportation of jobs, and costly remedial training efforts.

Recently, the New York Telephone Co. tested 22,880 applicants for operator and repair technician positions, and only 3,619—or 14 percent—passed. Motorola Inc. estimates that half of its factory workforce needs remedial work in basic education skills just to attain fifth-grade skill levels in math and seventh-grade skill levels in English. It is estimated that this remedial program will take five years and cost $30 million. Similar experiences are occurring across the nation.

It is time for education to restructure and retool. A major signpost of trouble is that we are approaching the 21st century with a public school system that was designed to serve the workplace and social conditions of the 19th century. Despite the dramatic economic and political changes this nation has undergone in the past century, we, as a society, have not demanded a quality public education for all youngsters to keep pace. For too long we have depended on the "cream of the crop" to carry us through. That worked in yesterday's economy. It will not work in today's or tomorrow's. In 1950, only 57.4 percent of American students graduated from high school, but those who failed to graduate could still find jobs and lead productive lives. Americans saw little reason to worry. Today, some 75 percent of our students graduate, but many of those, as the New York Telephone and Motorola experiences illustrate, are in no position to absorb education and training beyond the high school level. Yet, most jobs will require such training. Many potential entry workers will be unemployable. Many others will cost business thousands of dollars before they can be productive, and may never be productive enough to make business internationally competitive. And those who drop out nowadays will find it difficult, if not impossible, to find a job in an increasingly demanding and competitive workplace.

If America is to educate and train its youth to meet the demands and responsibilities of citizenship in a democracy, its system of schooling must be overhauled. Much like a business cannot afford a 25 percent margin of error, our schools, with a similar or worse record, cannot afford to tinker at the edges of reform. Fundamental change, restructuring, is necessary to improve school performance.

The National Alliance of Business believes that business can and must play an important role in that reform, understanding from experience that it is extremely difficult for a large institution to change from within without outside support.

> ***"They will seek jobs in an economy that will require virtually all workers to think flexibly and creatively as only an elite few were required and educated to do in the past."***
>
> *Turning Points*
> *Carnegie Council on Adolescent Development*

The Magnitude of the Education Enterprise

- Over $350 billion or 8.5% of the nation's GNP is spent on all levels of education.
- 4.1% of the GNP is spent on grades K-12.
- Education is a national business of 2.6 million teachers and 83,000 schools.
- In most communities, education has a bigger budget and more employees than the largest business.

New York City	$5.0 billion budget	1 million students
Los Angeles	$3.1 billion budget	600,000 students
Miami/Dade	$1.3 billion budget	255,000 students
Detroit	$ .8 billion budget	182,000 students
Milwaukee	$ .5 billion budget	93,000 students

"We believe that the business community has an important role to play in achieving major structural reforms on education."
Investing In Our Children
Committee for Economic Development

While business' stake is clear, the role that business should play in education reform is less understood. Business and education need to embark on a new joint venture focused on making fundamental changes in the schools. These two very different institutions must learn to work with and trust each other to attain a common goal—the best public education system possible for all children.

Business people and educators have already gained valuable experience in working together over the past decade. David Kearns, chairman of Xerox Corporation, has characterized these relationships, in which businesses respond to specific requests from schools or school systems, as "feel good" partnerships. In many of these partnerships, however, business has not held education accountable for results, or lack thereof. While these limited efforts are the seeds for future involvement aimed at systemic educational change, the time has come for business to become more active in new ways directed at major change, including:

- state/local policies and practices;
- the organization and management of schools and school systems;
- roles, responsibilities, relationships, and compensation of education professionals;
- national education goals.

"What we do need is a national agenda for school reform. We need a strategy that sustains state and local leadership, while giving coherence to the effort, overall."
Ernest L. Boyer
President
The Carnegie Foundation for the Advancement of Teaching

While the Alliance is convinced of the importance of and the need for national education goals and business people have a role in a national education agenda, this report is focused on the business role in effecting systemic educational change at the state and local level.

In ***A Blueprint for Business on Restructuring Education***, the Alliance offers conclusions, suggestions, and recommendations from its literature review, interviews, and discussions with educators, researchers, and business and education leaders. (A list of the sites visited and the people interviewed, along with other references, appears as appendices to this report.) ***A Blueprint*** reflects our work over the last three years including the Alliance's efforts in 12 cities to establish business/education compacts, the publication of a guide on business-education partnerships entitled ***The Fourth R***, and its work with the Departments of Labor, Commerce, Education, and Health and Human Services to help build a quality workforce through the education and training of at-risk youth.

The purpose of ***A Blueprint*** is to inform business about how it can organize and be involved at the state and local level to assist in restructuring education. There are many blueprints that can be developed that will enable business people and educators to build the kind of long-term relationships that the Alliance believes essential for the future. But all must include key elements that provide a sound foundation for action. This report identifies those key elements and the early steps that should be taken.

RESTRUCTURING AMERICA'S SCHOOLS

The Alliance begins with the premise that all children can learn, that we know the techniques that will enable them to learn, and that all can acquire the same basic skills and abilities. Our failure to educate many children well has more to do with what we teach, how we teach, when we teach, and who teaches. Young people with different interests and backgrounds may need to learn in different ways in different settings, or at different ages, but they can and should still acquire the same foundation of knowledge and skills.

The reason our schools have lost so many children is that we have patterned our education system after the 19th century mass production approaches of industry. We have tended to treat all children as though they were the same. Those who could respond to this singular approach to learning succeeded. Those that could not dropped out or learned little.

The Alliance also begins with the premise that business is no stranger to the difficult questions education must now face. Issues of what work is done, how, when, and by whom are ones businesses have had to address when faced with serious problems. Like business, education now needs to rethink its organizational structure, style of management, personnel and financial practices, staff roles and responsibilities, and training practices. Like business, it must think in terms of fundamental change or restructuring, which are geared to provide incentives for increased performance.

"What schools need internally is exactly what you are going through in American business right now. That is the same kind of thinking. What are we in this business for? What are the goals? How do we measure them?..."
Albert Shanker
President
American Federation of Teachers

Five Components of Restructuring

While there are similarities between business and education on the questions that need to be answered, business must first understand the context in which they must be asked. Business needs to understand what educators perceive as the major components of restructuring education—those components of change which answer the key questions of what, how, when, and who. From its research, interviews, and site visits, the Alliance has identified five components that seem to be vital in restructuring education. No one is an end in itself but each is a means to an end—improving the quality of public education by making fundamental changes in its structure, thus contributing to the larger goal of creating more effective teaching and learning.

Component	Addresses primarily
School based management	What is taught, how, when, and by whom
New professionalism	Who teaches and administers, and their preparation and training
Curriculum and instruction	What is taught and how
Accountability	What is taught and when
Linkage with social services	What, how, and when students are taught

The components are:

- **School-based management** (school-site management): operating based on the principles of shared decision-making and participatory leadership at the school among its professionals—teachers, school staff, and administrators—and the community. Parents and business people should be participants. School-based management changes the way schools are governed and managed. The intent is to shape at the school level, not the central office, the mission, management, policies, goals and objectives, and practices for the school. This management approach gives each school autonomy to make decisions on its organization and management, while making the central office a service provider. Such decisions can include teacher selection, and development and management of a school's budget.

Businesses have found that employees involved in participatory decision-making and a team approach to solving workplace problems have improved and changed both the quality and productivity of their work, and the quality of the work environment. Giving teachers and administrators more responsibility similarly helps create a more professional, productive workforce. Even though school-based management occurs at the local level, many states have, through legislation, provided authority and incentive grants to implement this management strategy.

New professionalism: providing additional support and incentives to increase professionalism among those who teach and administer. As business has re-organized and delegated responsibility to lower staff levels, it realized that attention needed to be paid to improve the capacity of staff as they assumed new roles. This is particularly important in the case of teachers and administrators.

To encourage the professionalism of teachers and principals, school systems need to develop new career opportunities through career ladders, flexible staffing arrangements, merit or performance-based incentives and rewards, and other forms of professional recognition. Teachers and administrators also need the same type of support systems business offers its professionals to keep pace with the latest information and techniques required to do a quality job. Central school administration needs to financially support—and teachers and administrators need to participate in—planning, structuring, and implementing an in-service training system.

To improve the education profession, new and current teachers and administrators require better training. No major business could survive in today's competitive markets without a training program to keep employees current with information, technology, and techniques, neither can education survive. This also requires a new cooperation between the state, universities, and school districts to reassess the process by which prospective teachers and administrators are prepared and trained, to reexamine the requirements for their certification, and to revise the system by which their staff development is provided.

Integrating improvements in professionalism with shared decision-making enhances a school or district's esprit de corps and the opportunity for successful reform.

Curriculum and instruction: revising and rethinking what is taught and how it is taught. Determining curriculum and textbooks has been largely a state function. These curriculum policies have been criticized for their lack of flexibility in meeting the varied needs and learning styles of students. To address what is taught, administrators and teachers must revise and improve the content of the recommended curriculum, both its scope and the content of approved textbooks. This also means giving individual schools more authority to determine what should be taught and what textbooks to use.

Teaching techniques, how material is presented, is equally as crucial. In most classrooms, teachers lecture, while students learn passively. Studies have found that students remember only 5 percent of what they are taught in passive settings. Students are far more stimulated and remember much more when they are actively engaged in the learning process. "How" one teaches is also influenced by the structure and management of individual schools. More creative approaches to learning that can fit student needs are more prevalent where there is school-based management.

Accountability: developing methods for measuring the attainment of goals and objectives of student and management performance. Businesses measure performance in both production and management in order to change and improve. Education has for years measured students' performance but rarely has translated

the results into changes in organization, curriculum, instruction, roles and responsibilities, or services. In part, education's failure to develop accountability systems reflects its inability to agree upon a comprehensive set of measures and indicators.

Restructuring requires the rethinking of the uses and types of measurement instruments in assessing performance. It is important that the measures and standards are useful and performance-based.

Accountability must be rigorous but fair. Because measures can sometimes have unintended effects (for example, increasing graduation requirements without offering more help to at-risk youth can increase dropout rates), business people and educators must carefully analyze all the outcomes desired, and an appropriate mix of strategies, standards, and goals must be developed that provides for both incentives and sanctions. All too often academic measures alone are developed, but there should also be measures of accountability for financial services, administration, and instruction. Not only students, but also teachers, principals, area administrators, and the superintendent need to be held accountable.

States have tried to establish accountability of schools and school systems by establishing statewide assessments for grade promotions; raising high school graduation requirements and setting minimum standards for individual school systems on achievement exams, dropout rates, school attendance, and grade retention. For example, failure to improve and meet newly required standards on certain measures has caused the New Jersey State Department of Education to declare the Jersey City school district academically bankrupt and to intervene in its management. At the local level, accountability should measure not only what students have learned but also how the educational experience has changed their behavior (e.g. more students are graduating rather than dropping out, or are being successfully employed, or are furthering their education).

As business has learned, employees and departments can most appropriately be held more accountable if they are given more power and authority. Similarly in education, the design and success of accountability systems is related to the degree of school autonomy. Accountability and school-based management are intertwined.

"Performance measures do more than just document individual accomplishment. They provide indicators for organizational effectiveness and efficiency..."
David Kearns and Denis Doyle, Winning the Brain Race

Linking education and social services: integrating the provision of education and social services. Schools have become more than a place for education. They have become a place where children's deep-seated social and personal needs mix with their education needs and limit their ability to receive a quality education. Growing numbers of today's students suffer from problems of neglect, ill-health, inadequate nutrition, poor housing, and drugs. They need special counseling and support.

Teachers and school administrators are not trained to cope with all of the personal and social problems children bring to school. It is critical that teachers have access to services that can help identify and target at-risk students early enough to prevent possible problems. While schools should not be expected to cure these problems, they must be aware of and have access to a broad array of social services. This is not possible with the fragmentation of social services and lack of communication between social service providers and the schools that now exist. To solve the fragmentation problem, education and social service agencies need to work together just as businesses have used joint ventures to address production or other problems that can not be solved individually.

The case management approach is often cited as the best means for building coordination. Under this approach one person, regardless of agency affiliation, is responsible for assessing a student's needs and has the authority to draw on services from a variety of sources. While educators are increasingly aware of the value of this strategy in restructuring, they often do not receive support from public offi-

cials for ensuring inter-agency commitment. Services need not be offered in the school, but state and local officials, and educators need to establish policies and practices that facilitate linking these services.

Even though the Alliance does not include **public school choice** as a component of restructuring, we feel the concept important enough to discuss and describe in ***A Blueprint for Business on Restructuring Education***, since it has received a great deal of attention and interest by government leaders, business people and educators. The Alliance has not included it as a component of restructuring because while we believe choice can be a catalyst for restructuring, it does not necessarily instill systemic educational change. Choice is not a substitute for the other components that have been described. If coupled with the components of restructuring schools in a systematic fashion, then there is reason to believe that it can assist in hastening fundamental educational change.

"...public school choice—at least some models of it—may be an engine to improve our schools, but it is not the whole vehicle and it doesn't drive itself."
Bella Rosenberg
Assistant to the President
American Federation of Teachers

Public school choice is perceived by many people as a single policy or approach, but it is really a variety of policies and programs. Each application of a choice program is very different from another. These range from intra-district to inter-district programs; a few magnet schools to a total school system with speciality schools; or a district policy to a statewide law. Public school choice means and is different things to different people and places, but is built on a basic principle that provides parents and children the opportunity to select the public school district, school, or school program they wish to attend. One important fact—magnet schools and choice are not synonomous.

Advocates strongly believe public school choice is an egalitarian approach to public education and a critical means to provide quality education through marketplace competition and accountability. They believe when students and families have the opportunity to choose a school their commitment to education increases. Proponents of choice also believe that as students turn away from certain schools, these schools will improve to survive or close.

Opponents feel strongly that public school choice is a distraction from or impedes the actions needed to improve public education. The critics argue that not all schools are equal because financial and intellectual resources have not been distributed equally within districts. Also, at the beginning of market competition, funds are not available nor school-based management policies in place to allow these schools to improve and become competitive. As students leave these schools, funding may be reduced. Meanwhile, choice critics argue, since better schools cannot expand to accommodate all interested students, many remain in their schools where the quality of education may be further reduced.

If a system of choice is to be implemented and used as a restructuring strategy, it must include a mechanism for improvement for the schools not "chosen" by students. Financial limitations of school systems often prevent this from happening. A system of choice also can not work unless it has clear goals and guidelines that avoid discrimination against any student; provides adequate information and counseling to parents and students about options and opportunities; and provides for program oversight and modification.

In the end, choice programs may artificially separate out certain students who are unable to have access to the educational program of their choosing, while the five components above are more apt to bring about fundamental educational change.

The five components of restructuring represent, in practice, a support system for educators—both teachers and administrators. By bringing the components together and integrating them in restructuring the education system, management, production, and performance can be greatly enhanced, and the quality of and satisfaction with education can be increased.

What Business Has to Offer

While education and business are very different, many aspects of business and the restructuring it has recently undergone are applicable to the education environment. As institutions organized to accomplish specific goals and answerable to measures of success and failure, business and education have much in common. While these commonalities can too easily be over-emphasized, they help illustrate that business has much to offer education.

As different as teaching and learning are from production and services, there is striking similarity in the tasks both face. In order for educators and business leaders to forge new collaborative partnerships, business people must start by understanding the issues of education restructuring. It is also important to note that there are commonalities on which to build.

Common Characteristics

Successful Businesses Require:	Effective Schools Require:
■ Strong leadership & vision	■ Strong leadership & vision
■ Clear goals and objectives	■ Clear goals and objectives
■ Strong quality requirements for products	■ Strong academic and behavioral requirements for students
■ A workplace conducive to getting the work done	■ School setting conducive to learning
■ Worker involvement in decision making	■ Principal, teacher, and parental involvement in decision making
■ High expectations for the performance of employees	■ High expectations for the performance of teachers and administrators
■ Autonomy for management at the work site	■ Autonomy for management at the school site
■ Staff with up-to-date skills	■ Administrators and teachers with up-to-date skills
■ Up-to-date equipment	■ Up-to-date equipment

When either educators or business people fail to meet expectations, they must question who makes the decisions and how they are made, how work is accomplished, and how employees are prepared to do the work. At this time, many business people can offer educators some particular assistance, because of their recent experiences. Beginning in the 1970s, business entered a period of crisis and intense introspection, which led many business leaders to question their organization and operations, and often resulted in restructuring. Business thus has a history, a recent institutional memory, of the implications and complexities of restructuring. It is this knowledge and experience coupled with the characteristics common to both sectors that can be helpful to education. Areas of support include management analysis and improvement, advocacy, staff development, and research and development. Therefore, before turning to steps that business people should take to work with the schools, it is important to note those experiences and expertise that can be useful in efforts to restructure education.

"What business has learned for itself is consistent with school-based management: you push responsibility and accountability as far down in the system as you can. You must set clear standards, give resources to do the job, let them alone to do it, and then carefully monitor and evaluate what they've done."

P. Michael Timpane
President
Teachers' College
Columbia University

"I think you should work on pushing decisions down to the school level, getting rid of middle layers of management and regulation and giving the teachers more authority over how the school day, the school year, and the learning process is organized."
Bill Clinton
Governor of Arkansas

Management Analysis and Improvement

Initiating restructuring: Just like a business that has restructured, education can survive by reshaping and reorganizing to meet new needs and demands. The realization that an organization must change to remain viable is fundamental to education restructuring. In their own way, public schools and systems can be declared academically bankrupt. But educators should not wait until a bankruptcy has been declared before a system should assess itself and initiate actions which constitute a reorganization. Business has restructured when it has recognized that one or more aspects of its work or organization were unprofitable, inefficient, or non-competitive. Business understands what it takes to reorganize management; centralize or decentralize decision making; contract out services; change management-employee relationships, participation, and responsibilities; and recognize and reward employee performance. These are concepts that education needs to address in instituting systemic change, and business can assist educators in thinking through needed steps and their implications.

Developing goals and objectives: Crucial to restructuring is a redefinition of goals and objectives. Education's goals need to be redefined given the needs and demands of society and the workplace. Although defining education's mission in operational terms is difficult, it needs to be done before education can make changes to meet society's needs.

Many businesses confronted these issues within their own companies, and after redefining goals and objectives, made decisions that enabled them to reorganize. Similarly, once a school system has set its education mission and objectives, then individual schools will be able to set their education policies, goals, programs, and practices, and can develop a strategy for restructuring.

Conducting analysis and planning: In order to restructure, schools must strengthen their capacity to analyze problems and develop long-term plans and strategies to address them. Many education systems do not actively engage in strategic planning or have strong skills in this area. Business can bring both an objective perspective to analyzing the issues and problems of education, and experience in strategic planning. Plans must also provide for periodic assessment in order to modify strategies, another area in which most school systems are weak. Analysis and assessment of an education system can be an excellent starting point for the business community. These activities can build a greater understanding for business of the education system and its issues and can provide educators needed support.

Advocacy

Building coalitions and partnerships: Businesses form partnerships when there are shared problems or common agendas in research or production. Many business people have also worked in community and civic groups. These kinds of relationships and alliances with a wide variety of groups are essential in developing broad-based community support for education restructuring. In addition, the involvement of business people with social service agencies, through such activities as private industry councils or board memberships, can be an important force in pressing for linkages between those agencies and the schools.

Leveraging support: In order to change public policies and structures, educators need to obtain broader community and political support. The experience and independence of business can be very important. Over time business leaders have built alliances in the community, and working relationships with prominent community organizations and politicians. Additionally, business knows how to promote an idea to gain support and develop materials that are consumer-oriented. Business can use its leverage to explain the problems and issues related to education to media editorial boards; to promote initiatives and suggestions for systemic change; to lobby and testify on behalf of education reform; to orchestrate grassroots lobbying; and to ensure that public education remains high on the public agenda.

"The business community needs to build a constituency for education within its own community—build a base for change."

Richard I. Beattie,
attorney and former member of the New York City Board of Education

Staff Development

Improving teacher and administrator capabilities: Business has come to recognize the critical importance of staff development, particularly at the time of restructuring. Staff cannot assume new roles and responsibilities unless prepared in advance to do so. Business can also provide training in management skills for school and district administrators or provide support for the development of new courses at universities. Business can also help in restructuring the use of staff development dollars and in advocating for funding of the system's staff development program—an area often neglected by state legislators and local school boards.

Research and Development

Fostering creativity and new approaches: While the adequacy of business investment in research and development is at times criticized, business invests far more in these efforts than education. In fact, those businesses that have been most successful are those that are recognized for fostering creativity and the investigative spirit. Once business people appreciate the limitations of experimentation in their schools and school districts, they can help advocate for greater investment in new teaching approaches and management strategies and initiatives. They can also be instrumental in providing seed money to encourage and recognize experimentation by teachers and administrators.

Applications of Technology

Applying new technology: Given current markets and competition, business must remain technologically current to maximize its limited resources. Successful businesses must be up-to-date on the newest technology, both hardware and software, and apply these technologies to be more efficient and productive. Similar types of knowledge and expertise are very useful to education in improving the quality of management, training, curriculum and instruction, and equipment; yet expenditures on new technology are given a low priority by school boards and state legislatures, and the training for applying these new technologies is often given even less attention.

Using the Experience of Business in Restructuring Education

RESTRUCTURING COMPONENTS ▶ / BUSINESS SKILLS ▼	School-based Management	Professionalism of Teachers and Administrators
Advocacy	■ Support authorization of policies and programs encouraging school-based management ■ Encourage local school boards to initiate school-based management ■ Encourage school systems to maintain and rehabilitate their buildings	■ Lobby for increased resources for teacher development ■ Press for changes in state teacher licensure policies
Staff Development	■ Provide mentors for staff training and development for those serving on school improvement councils ■ Promote the team approach to instruction and management through staff development	■ Establish training centers for administrators and managers ■ Invest in college and university curriculum changes ■ Establish sabbaticals and internships for counselors and teachers in business ■ Use HRD methods and systems to increase productivity of in-service training
Management Analysis & Improvement	■ Perform management and performance assessments of schools ■ Share restructuring experiences to overcome problems ■ Assist in developing strategic plans, and new budgeting and management techniques ■ Provide technical support to school systems on the cost efficient management and upkeep of their physical plants	■ Invite school administrators to corporate management training courses or to work with a corporate mentor ■ Share industry recruitment and retention techniques with school administrators and school boards
Research & Development	■ Establish endowment fund at district level to fund innovative management approaches	■ Assist in developing measures to evaluate the effectiveness of staff development and management improvement initiatives
Applications of Technology	■ Assist in assessing technology needs to improve management ■ Provide ongoing technical support ■ Provide computer hardware and software	■ Provide assistance in applying computer technology to management improvement ■ Provide assistance in developing training for teachers and administrators in the use of computers

Curriculum & Instruction	Accountability	Linking Schools with Social Services
■ Serve on committees and panels revising curricula ■ Lobby for curricula changes	■ Lobby for changes in assessment policies	■ Press for policy and programmatic changes in state and local governments to link social services with the school
■ Serve as a technical resource in curriculum development	■ Provide training to principals and teachers in staff performance evaluation	■ Promote the team approach to instruction and management through staff development
■ Serve as a technical resource in the development of accountability/performance measures for teachers and administrators ■ Communicate to educators the skills required for the workplace	■ Develop management accountability systems ■ Assist in developing performance pay plans ■ Assist in developing improved contracting procedures ■ Solicit community input through surveys on needs and goals of schools	■ Help schools and social service agencies delineate roles and responsibilities
■ Offer mini-grants as incentives to teachers to initiate innovative approaches	■ Work with district evaluation staff to demonstrate different assessment instruments.	■ Provide start-up incentive grants to initiate linkage projects
■ Provide technical assistance in applying technology in the classroom ■ Assist in purchasing hardware and software	■ Develop or apply existing technology to performance-based learning	■ Develop systems for new or improved data bases and records on children that can be shared among schools and agencies

"I would like to emphasize the important role of corporations in providing supplemental learning strategies."

Marian Wright Edelman
President
Children's Defense Fund

Using the Experience of Business

With the cooperation of business leaders associated with the Greater Milwaukee Education Trust (The Trust), the Milwaukee Public Schools has initiated a management partners program with individual school principals. The Trust describes itself as a civic partnership formed to help develop human resources to their fullest potential. It is an outgrowth of the Education Committee of the Greater Milwaukee Committee, a business organization.

School principals who are developing a school-based management approach for their schools are assigned a management partner from Milwaukee's business community. The partners work with the principals and staff on various management and governance issues and problems. These partnerships coincide with school-based management training provided by the school district and monitored by the school-based management committee of the Milwaukee Public Schools. Both educators and business people serve on this monitoring committee.

This partnership process applies the experiences of business executives to the management of a public school. What has evolved from this relationship is a strong partnership with the school to address issues that go beyond governance and management. The management partners have brought in additional business staff to work on problems raised by the school in such areas as technology, curriculum, and in-service training. One of the positive outcomes has been that each sector has learned from the other.

There is no short supply of business executives who want to be management partners. There is a short supply of schools that are initiating school-based management. The Milwaukee Public Schools will begin this approach only with the approval of the principal and staff of that school. Currently 18 schools are participating and 12 more schools are expected to join the program in school year 1989-90.

When business helps out in these ways, particularly when that assistance is part of a plan collaboratively developed with state or local educators, it can bring about important educational change. The chart on pages 10 & 11 provides more specific examples of functions and skills common to businesses that can contribute to education restructuring. (Other activities under the Alliance's Corporate Action Agenda will address these roles in more detail.)

BUILDING A COMFORT ZONE

Despite the commonalities and the compelling need to get involved, business has had difficulty "coming to the table" and discussing its concerns with educators. One reason stems from strong misconceptions and cultural differences between the two sectors. Educators have acted at times as though education was solely their domain, perhaps because of business' benign neglect of the public school system. Furthermore, business' unfamiliarity with education and the organization of the public school system has made it reluctant to participate. Before entering into a change process that may not be welcome by educators, business people need to become aware of and learn about education practices and policies. They need first to build a comfort zone before making recommendations and taking action.

"No two groups in America know less about each other than business leaders and educators."
Denis Doyle
Co-author, Winning the Brain Race

An Education Gap

Business people need to learn more about the dynamics of the public education system—its issues, policies, practices, organization and infrastructure, and players. Building a comfort zone is a learning process, which reduces business' education gap and increases its ability to leverage and work for fundamental educational change. The learning process prepares business, its leaders and workers, for a lasting commitment.

Executives are all too familiar with the problems of outsiders providing advice on how to run their business without knowing the first thing about the operation. If business were to hire a management consultant to improve productivity, that consultant would be expected to spend some time on site, observing the operation, reading appropriate materials, talking with employees, and then drawing conclusions and making recommendations based on the observations and information collected. Business needs to take the same approach in becoming knowledgeable about and involved in public education—in building a comfort zone.

However, during this learning process business people need to remember that the public and private sectors do business differently in some ways and exist for different purposes. Business people must ask themselves whether their own methods and strategies would fit in the management of public education. Not everything will work, just as every new strategy or approach does not work in business the first time. One needs also to be reminded of other differences; for example, business controls its raw materials, but education does not. Business can divest itself of unprofitable divisions or move into new industries. School systems, obviously, cannot.

Barriers to Getting Started

In order to begin, educators and business leaders must overcome the barriers of mistrust that separate them. Some educators believe business involvement in education is an effort to control the schools. Some business people, on the other hand, believe all educators are resistant to change or outside advice. If business and education are to be partners in restructuring the schools, then existing barriers and misconceptions need to be overcome. If not, they remain a liability to any form of involvement, cooperation, and potential improvement.

"The politics and bureaucracy of public education are a real culture shock for business."
Vaughn Beals
Chairman
Harley-Davidson, Inc.

Educators have had many excuses to keep business out of education and have harbored many misconceptions about business:

- Business is interested in controlling the schools.
- Business is simplistic in identifying solutions to education problems.
- Business methods and strategies have no application to education.
- Business is always opportunistic and only involved for profit and good public relations.
- Business is only interested in lowering taxes, reducing school budgets, and defeating school bond issues.

A Blueprint for Action

Early Awareness—Recognizing the Crisis

- Recognize Need for Systemic Changes in Education
- Recognize Workplace Problems Are Tied to Quality Education

The Comfort Zone—Learning About the Education System

- Join with Other Business People; Involve Others
- Build Trust with Educators
- Overcome Barriers and Misconceptions
- Obtain Firsthand Observations of School Operations
- Experience Education Organization and Politics in Action
- Understand Issues and Problems Confronting Education—National, State, and Local

Joint Action for Systemic Change—Organizing to Take Action

- Involve Allies in Community
- Identify Leadership Needed to Maintain Momentum
- Establish Ongoing Organization Focused on Systemic Change
- Develop Action Plan with Goals and Measures
- Institutionalize Corporate Policies
- Take Action

Educators need to begin to understand business—its concepts, goals, practices, and culture—to be better able to work in new joint ventures.

For business' part, education's politics and bureaucracy provide a culture shock. Most business executives are used to making decisions in the privacy of corporate offices away from public scrutiny. This is not the case in education, or elsewhere in the public sector, where decisions are made in a "fish bowl." The culture shock is compounded by the lack of knowledge of the complexities of education issues and governance. Business needs to overcome these cultural hurdles before becoming involved in education reform.

Hurdles Business Will Face

- The complexities of education and social problems facing schools today.
- The public nature of the education policy process and how it works at both state and local levels.
- The various roles and political postures of organized interest groups and boards.
- The laborious, frustrating, and exasperating nature of the decision-making process.
- The planning and budget processes that differ greatly from the private sector.
- Differences in flexibility to act.

The reality is that the education system needs the interest and participation of business to create a positive environment—the right conditions for systemic change.

Business Gets Smart in South Carolina

In 1983, then Gov. Richard Riley realized that education was an important issue. When Gov. Riley's staff analyzed student performance among many states, South Carolina did not fare well in comparison.

The governor sought the support from a dozen prominent business leaders for a penny increase in the state sales tax if the increase were tied to education. The leaders agreed only if the governor had a good plan for education improvement. In the summer of 1983, the governor and Charlie Williams, the State Superintendent of Education, formed two blue ribbon committees of business leaders, educators, and state legislators.

Terry Peterson, an aide to the governor, was given the responsibility for organizing and directing these two newly formed blue ribbon committees, the Committee on Financing Educational Excellence and the Business-Education Partnership Committee. In June 1983 the Committee on Financing Excellence began the learning process in order to report findings to the Partnership Committee. The group was pushed to learn quickly but thoroughly about school issues because the governor had set a deadline to present legislative proposals for education reform.

During early meetings Peterson arranged for reports and other materials that examined data on achievement, teacher salaries, and dropout rates. Members were provided with a variety of national studies on the quality of education, including ***A Nation At Risk***. After a grounding in specifics about education, the discussions turned to individual perceptions about education problems and solutions. Teachers and principals offered the local point of view and an understanding of the problems schools face. Experts were brought in from both inside and outside the state to ensure that national reform issues and ideas would be explored.

After five months the Committee on Financing Educational Excellence wrote a report on what they had learned and what they believed should be the priorities and goals for a statewide education initiative. These became the foundation of the Partnership Committee's recommendations to the governor for legislation. Through an active partnership between the governor and business leaders, landmark legislation was passed in 1984. The governor had orchestrated and introduced the first real state education reform in the nation.

The initial six goals of the education improvement legislation and effort were:

- Strengthen the teaching and testing of the basic skills.
- Raise student performance by increasing academic standards.
- Evaluate the teaching profession by strengthening teacher training, evaluation, and compensation.
- Improve leadership, management, and fiscal efficiency of schools at all levels.
- Guarantee results by implementing strict quality controls and rewarding productivity.
- Create more effective partnerships among the schools, parents, community, and business.

Today South Carolina is working on the third phase of reform legislation, which is building on the successes of the first two phases. The Joint Business-Education Committee, now known as the Business Education Partnership for Excellence in Education, has continued as a mandated structure to oversee the implementation of the statute and the use of the penny sales tax. Business remains actively involved, but credit must go to former Gov. Riley for his vision and leadership in bringing the two groups together to initiate education reform.

Some of the education improvements over the past five years are:

- SAT scores have increased 40 points—the largest gain in the nation.
- Enrollment in advanced placement courses has increased 350 percent.
- Elementary school student achievement has increased 21 percent and secondary student achievement has increased 15 percent above national norms.
- Vocational graduate employment in related fields has increased 8.1 percent.
- High school graduates entering college have increased 6.2 percent.
- Carnegie Foundation's national survey of teachers ranked South Carolina first among states in its efforts in school reform.

The Learning Process

Where business people appear to have initiated a sound, long-term partnership with educators, they have made a conscious effort to understand education issues. Sometimes, they have begun this process in response to a request for assistance from a governor or superintendent, other times they have been the initiators. Regardless of the particular order in which events have occurred, it should be noted that conscious efforts to learn about education have marked joint restructuring efforts. In South Carolina a few years ago, joint business/education committees established at the request of then Gov. Richard Riley knew from the beginning that their purpose was to develop legislative recommendations. The learning process became a means to that end (see box on South Carolina, page 15).

"The education process took one year. It was good but frustrating and laborious."
William Randall
Executive Vice President
First Bank of Milwaukee

In other cases, business people concerned about the schools and contemplating action have come together solely to gain knowledge on the issues and problems. Their follow-up steps are indefinite and unplanned. In Chicago, business people consciously built alliances with educators and others in the community in anticipation of future action, although the precise nature of that action was not initially defined (see page 24 for a description of Chicago's restructuring effort).

The learning process takes time and commitment. In places where this process seems to have paid off the best, business people have set a time limit to study the issues and problems. They have also developed a plan to build their knowledge of local, state, and national education issues. Efforts in South Carolina and Milwaukee are good examples (see pages 15 & 20). While these efforts have ranged from three months to a year, learning about the system and education issues is a dynamic and continuing process according to all of the business people with whom the Alliance spoke.

Building a comfort zone requires:

Obtaining a firsthand perspective. Business people should visit schools to observe and understand not only their social makeup, but also plant and work conditions, equipment, and learning environments. Schools will have changed since current business leaders attended them. Daily, schools now confront societal problems such as drugs, teenage pregnancy, homelessness, poverty, hunger, working parents, latchkey children, and single-parent households. They also reflect the problems that have confronted business since the late '70s and early '80s—outdated machinery, deteriorating plant facilities due to lack of capital investment, and workers who have not been supported with training to remain up-to-date with the latest methods, equipment, and technical information.

Business people should also visit classrooms, observing students and teachers. They should get a sense of pedagogy and curriculum. Is it the same for all students? Is the focus on student engagement, active learning, and higher order skills, or limited to basic, remedial work, drill and practice, rote memorization? It is important to understand classroom culture. Business observers need to ask themselves whether they would learn in this environment, what they would learn, whether it is relevant, or whether the classroom is built on learning or control.

"Business needs to realize that decision making will be slower."
James Forbes
CEO and President
BadgerMeter Co.

Experiencing education's organization and politics in action. Business people need to observe state or local education board meetings, legislative hearings, and if necessary, city council meetings. These activities expose them to the style and substance of education board meetings, politics, and decision-making, while also increasing their visibility in the community.

Gaining an understanding of the issues and problems that confront education. Business people need to understand the broad spectrum of national and state education reform issues and experiences. A business or business group provides a natural forum for the discussion of these issues, because either can often provide or hire staff to manage the learning process. Staff can initiate presentations by consultants and education experts; develop in-house materials on specific issues and subjects; analyze commission and research reports and policy and issues papers; discuss state and local education policies and practices; and review education budgets.

Orchestrating the Process

Top business leaders in a community must help build a comfort zone if restructuring of the school system is to follow. Chief executive officers, board members and senior executives must be knowledgeable on education issues; down the line, when political leverage is needed, it will be too late to get them on board.

Business has generally been most successful if it has orchestrated the learning process by using established business or civic organizations within a city or state. In California, Minnesota, Boston, Chicago, and Milwaukee, established business organizations created education committees to build a comfort zone before moving forward. This is not always the case, but seems to be the rule rather than the exception.

One exception occurred in South Carolina, where the governor took the lead. In 1983, then Gov. Richard Riley established two committees of business, state legislative, and education leaders to study the issues and make recommendations for new legislation to improve education in the state. These committees continue to function as advocates for education reform in the state.

Some superintendents and school boards have realized the importance of building a comfort zone to work with business. In Pittsburgh, Rochester, and Miami/Dade, the local superintendent took a leadership role in pushing for restructuring activities and solicited support and involvement from the business community.

Schools Taking the Lead

Miami/Dade County School Superintendent Joseph Fernandez has sought out coalitions and partnerships with business, including local chambers of commerce. The school system is a member, no longer an invited guest, at the Greater Miami Chamber meetings, and the superintendent sits on the policy and planning committees. Education is a full partner in promoting the county's economic development. Because he has become knowledgeable about and gained the trust and respect of the business community, the superintendent is asked for advice by the business community in shaping policies and practices that go beyond education.

"If you treat business as a partner, policy changes and the future direction of schools will be assisted."

Joseph Fernandez
Superintendent
Miami-Dade County Public Schools

When governors or top education officials have invited business to help them, accomplishments have tended to come more quickly and are more far-ranging. But such invitations are often not forthcoming, and business people cannot afford to wait for them to occur. For this reason, in many locations, business people have begun the learning process on their own.

In many instances when business has initiated efforts to build a comfort zone, it invited educators, community people, and politicians to participate on a voluntary basis. This happened to varying degrees in Milwaukee, Chicago, Atlanta, Cincinnati, Pittsburgh, and South Carolina. Allowing others to participate is highly desirable, because it provides an early opportunity to dispel some of the misleading preconceived notions about each other. Using various techniques and strategies to draw out the issues and problems facilitates cooperation and understanding. The process is simple and pragmatic with an outcome intended to benefit the whole community. Once trust is established, many of the barriers quickly dissipate. There is a common agenda for both groups—business and education. And politicians and educators realize that business is a crucial player in building communitywide consensus on the issue of restructuring education.

A Rite of Passage

One might characterize the building of a comfort zone as a rite of passage for business to gain trust and credibility with the education community.

"The goal is a partnership directed by CEOs, but first you need to educate the individuals about the mysteries of state and local government. Then, they can address the issues."

John Cairns, attorney and former Executive Director of the Minnesota Business Partnership

Business has been viewed as an outsider by many educators. Although business may have credibility in a community, it has not been an agent of education reform. As a result, it is critical that business become knowledgeable and comfortable with eduation's system, organization, and issues. In smaller communities, business leadership is usually well-known and may not need to go through such elaborate steps to build trust and credibility. But in large urban settings, business does need to prove its commitment. It needs to show that it understands the business of education and that it is genuinely concerned about the schools and the education of all youth.

Even a business that has been involved with schools through a "feel-good" partnership or grant program will find it necessary to go through this rite of passage. Although such partnerships and programs provide visibility and credibility for the business involved, without the proper grounding—a solid understanding of the issues and operation of a school and school system—business is unlikely to ask the tough questions or raise the critical issues that are fundamental to systemic change; nor are educators likely to seek their input. Business will not feel comfortable with the issues and will remain only peripherally involved, if at all.

Business must recognize that it will not always be easy to build a comfort zone. The point of the process is to be knowledgeable, or comfortable, with the issues and to build trust with the key players; the questioning, negotiations, and politics that occur during this learning phase and the action phase that follows will often not be comfortable for any of the participants.

Taking Action–The First Steps

While building a comfort zone, participants will identify a broad spectrum of education issues and problems that need attention. If the process simply were to end at this point, the findings, conclusions, and recommendations would not be translated into action.

In this transition from learning to action, the partnership needs to develop a process and plan to identify and implement its priorities—the systemic changes that should be made. Ideally, participants will develop a strategic plan and an organizing framework for carrying out that plan. This has not always occurred.

While in some of the places we studied, systematic steps were not consciously taken as part of a coherent process, many business people the Alliance interviewed identified some critical ingredients that have proved to be common to successful partnerships. Similar ingredients have been identified by the social policy research firm Public/Private Ventures in an independent evaluation of the Alliance's 12 city business/education compact project.

Sometimes these steps were taken during the comfort zone phase, while at other times, they evolved as participants began to implement specific fundamental changes. These ingredients for success are:

- **Identifiable leadership.** In the sites that were most successful in entering the implementation phase of education restructuring, an effort was made to identify those who were committed to substantial reform over the long term, and steps were taken to shore up areas where additional support appeared to be necessary. It was important to have leaders from business, education, government and the community, and not simply their representatives.
- **Broad vision translated into practical objectives.** Business people and their partners needed to take the time to develop together a broad vision of what they hoped to achieve. They needed to translate their vision into practical actions and engage in a joint effort to identify a school's or education system's strengths and weaknesses to determine the partnership's focus.
- **An ongoing structure.** Significantly, successful business/education ventures have recognized the need for some ongoing structure(s) to orchestrate action and keep the key leadership engaged. Staff in this entity, which is usually very small, have to be credible to and trusted by all parties.
- **Agreed-upon plan of action.** Successful partnerships must develop clearly written statements of goals, objectives, timetables, and performance measures. They should further establish a mechanism for reviewing progress and refining plans as they proceed.

Experiences in trying to make this process a successful one that would lead to systemic change have revealed the following important guidelines for business people.

"We urge business to examine the potential for improving education through existing intermediary organizations in the community and to take the lead in establishing new organizations if needed."

Investing In Our Children
Committee for Economic Development

Establishing an Ongoing Structure

An important step for business is to decide whether to continue to enhance the organization used during the comfort zone phase or create a new partnership (a new joint venture). It can be a new group, an existing civic organization, or a local private industry council. Whatever the decision, an organization needs to be established that is ongoing and will sustain commitment, develop plans for action, and initiate activities directed at systemic educational change. Membership should be broad-based, drawing from all sectors and segments of the community.

"The key was recognizing from beginning to end that it had to be a coalition of interests."

William Page
Executive Vice President
U.S. Shelter Corp.

Evolving from a Business Organization into a Coalition

The Greater Milwaukee Committee (GMC) is a typical urban business organization that works on community and social issues.

In early 1986 the GMC formed an Education Committee to study education issues in the greater Milwaukee community. Several studies, including a governor's report on education issues and problems, had just been completed. One of the staff from the governor's study, Susan Phillips, became the staff director for this new Education Committee and shaped the building of business' comfort zone. Once the committee was formed and made knowledgeable, it made recommendations in its final report to the GMC on what the role of business should be in Milwaukee's public schools.

As a result of the final report, a new group evolved from the Education Committee to carry on its work. The new organization is called The Greater Milwaukee Education Trust (The Trust), and it has broad community participation. The membership is drawn from business, community, and civic organizations, universities, the private industry council, city government, and the school's staff and board. The Trust has funding from the GMC, Metropolitan Milwaukee Association of Commerce (the local chamber of commerce), Milwaukee Public Schools, Rotary Club of Milwaukee, and other individual corporations.

The focus of the restructuring effort (state, local, or national) may dictate the type and shape of the organization and its membership. However, the Alliance's experience and research indicate that if a new organization is formed to take the place of the initial business group or committee, there is a higher rate of success in stimulating restructuring. A new organization can focus solely on fundamental changes in education.

Second, most new groups are coalitions that have a broader base of participation and support than a business committee. Business should not be the sole participant; collaborative efforts for restructuring should be drawn from a coalition including educators, business people, elected officials, and parents. If any one player is missing, the chances for success can be compromised.

The controversial nature of education restructuring provides a third reason for a new and separate group. Business people who become deeply involved in controversial issues and advocate controversial ideas or policies may find it preferable to separate these initiatives from the primary mission of their businesses or organizations.

Developing an Action Plan

In the best of worlds, the partners should, before taking action, take the time to sort through their findings and recommendations in order to set priorities for action, so they can focus on those issues they feel should get attention first. In some instances, the Alliance has found that the participants took action before setting that strategic course, and found later that they needed to step back and establish a more methodical strategic planning process, if they were to have the impact they desired.

Partners have found that a strategic plan is needed to set a direction for the actions for the partnership. This plan should set goals, objectives, and milestones for the partnership and should specify how progress will be assessed and who will be involved. Because of the political and public nature of education, the partners, especially those from business, need to be particularly sensitive to the attitudes of the key players inside and outside education. Actions in public institutions require not only an understanding of the issues and priorities, but an unusual degree of awareness of the environment in which those actions occur.

"Our business community didn't just watch the sausage being made, they were willing to get in and do some of the grinding themselves."

John I. Rogers
Speaker Pro Tempore
South Carolina House of Representatives

Choosing a Focus

One fundamental decision for business people and their partners is determining whether to press for fundamental educational change at the state or local level—i.e., choosing a niche. While business can work toward change at both levels, restructuring takes time, and working on two fronts may deplete resources and dissipate the focus. The partnership's members should consider limiting their efforts to one level initially, even though it may narrow their perspective on the total policy and practice changes that are needed. Although some business leaders may be able to participate on both levels, being spread too thin can limit effectiveness.

Before making a decision on whether to focus efforts on the state or local level, business and its partners must agree on which problems to address. A partnership might focus its efforts on any of the five restructuring components described previously. Business must also decide how it wishes to focus its time, energy, and resources, and what roles it can best play to have the most influence and impact. What was learned in the comfort zone should influence this decision. Business must be aware of the political climate. If the governor is interested in education reform, business might focus its efforts at the state level; if the superintendent has made overtures, the local scene may be the most appropriate arena for action.

Choosing to focus on reforming state education policy means being involved with the governor, state legislature, state board of education, and state education agency. The roles vary for each player, depending on state law and the individual who fills each position. Governors, chief state school officers, and state legislators have been most active in pushing for education reform through new legislation. Legislation has provided authority for restructuring activities such as school based management; changes in requirements for teacher development, training, and certification; rewards recognizing outstanding performance by students, teachers, or administrators; accountability measures through statewide assessments and graduation requirements; and development of new and revised curricula. Also, legislation has created incentives and grants for innovative school programs, teaching, administration, and curriculum offerings. Some states have increased their taxes to pay for school reform initiatives and increased teacher salaries.

Business' role at the state level is to work for systemic changes by lobbying and testifying on the above state policy issues; working with the state legislature or governor to shape and focus the state education legislative agenda; suggesting new policies to the state board of education; and recommending to the chief state school officer new state policies and programs focused on state and local education management, teacher development, training and certification, and curriculum. Working at the state level may also involve actively supporting reform-minded candidates to the state board of education; serving on the state board to press for restructuring; or taking an appointment on a governor's blue ribbon commission addressing issues of restructuring. Most of these efforts have an impact on local education practices but address statewide needs.

Minnesota Business Partnership Chooses a Focus

The Minnesota Business Partnership (MBP) is an organization supported by 82 corporations in the state with a mission focused on the issues of state fiscal policy, employment, civil justice, and education. In 1983, The Education Task Force of the Partnership spent $250,000 on a study of education in the state. MBP hired Berman Weiler Associates of California to conduct an analysis of state education issues. This study helped the MBP establish its education priorities and develop an education agenda that focused on the reform measures of education choice, accountability through statewide testing, and career ladders for teachers.

From this report MBP promoted the concept of school choice as a legislative initiative, which coincided with the interests of Gov. Rudy Perpich. MBP worked with the governor and educators to promote the idea of school choice and its passage in the state legislature.

By becoming knowledgeable about education, the MBP answered one question—What does business know about education?—and allowed a new question to be asked—What can business contribute? The MBP is in the process of re-examining the state's current education issues to establish new priorities and develop a plan for the Partnership's new education focus.

Choosing to work in one's own community involves working with the local school board, school superintendent, parents, teachers, and principals. The most fundamental restructuring happens within local school systems. Working for change at the local level presents an opportunity to affect the day-to-day operations of schools and learning experiences. The local school system can be likened to a local plant or manufacturing site that needs to improve its productivity and quality. Changes might mean downsizing central office staff, decentralizing the decision-making authority, developing innovative school programs, and developing new accountability measures.

Business can suggest systemic changes during meetings with the superintendent and school board members, testify before the school board on the budget and programmatic matters, serve on the search committee for a new superintendent, and lobby the state legislature on behalf of the local district efforts. These efforts place business and its partners in the position of working inside the system. They may also choose to work outside the system by supporting the election of a new slate of school board members who are committed to the partnership's ideas. This approach was successful in Detroit with the election of three new board members who ran on a reform platform against three incumbents. The three new members were elected with the support of a new broad-based partnership that supported education reform initiatives.

The Sovereign State

Most state education statutes and rules establish a separate class of school district for larger urban school districts and treat those districts as separate entities from other districts in the state. Different sets of rules for management, staffing, and organization are often created. Many times these rules inhibit good management practices. These districts are treated as if they were a sovereign state, but without the authority of such a state.

These school systems lobby on behalf of their interests, especially when it comes to the state education budget and allocations, but it is difficult for them to lobby state legislators to change rules that only affect a few select districts in a state. Business people need to be aware of these unique situations, because business and its partners combined often have considerable clout at the state level. The role of business as an advocate for changing rules to improve school management and governance, employment policies, contracting procedures, and education offerings can be particularly important.

Conversely, when trying to institute restructuring in large urban districts, it may be necessary to establish state rules that handle the district as a sovereign state. This is because the dynamics for change are so different from smaller districts. In this situation, business can be a promoter of such a policy to the governor, state legislator, and chief state school officer. Certain policies, rules, and regulations that govern districts in a state, regardless of size, must be flexible or waived to provide incentives and flexibility to enable restructuring decisions and actions. Often, a positive experience with reform for larger districts will initiate policies that encourage reform throughout the state.

Taking a Risk for a Good Cause

Working for fundamental educational change is a risk-taking venture. The ideal situation is for those outside the system (business, community groups, unions, and parents) to work cooperatively with those inside the system (superintendents, school boards, teachers, principals, governors, legislators, and the state education agency) to take risks and initiate systemic educational change.

When a cooperative effort is not possible, and one or more parties from inside the system are seen by the partnership as part of the problem and not the solution (unwilling or unable to take the needed steps), then the partnership needs to go forward without them. When this occurs business leaders should move ahead while at the same time finding and cultivating allies—from inside or outside the system.

Business must recognize that this strategy, going without all the partners, can be a risky venture, but if business has built its knowledge base, it should be comfortable taking a lead role. Business must be careful in selecting strategies, because if it loses initially in its effort to initiate changes in education policies, structures, and practices, it may be very difficult to be effective in working for future education reform.

"The vision of a totally educated population and responsibility to achieve it must be shared by everyone. The road to education reform is not clearly marked, never easy, and sometimes hazardous. Yet the destination is definitely worth the cost."

Peter McWalters
Superintendent of Schools
Rochester, New York

Chicago Business Takes a Risk

Chicago's business leadership and other community organizations had been thwarted by the school board and the superintendent in their efforts to work together to restructure the public school system. Business joined other community groups in taking a risk to fight to improve the school system. Had they not succeeded, it would have been very difficult to work with the current school administration and former school board to establish any dialogue for reforms.

In 1986, then-Mayor Harold Washington created the Mayor's Summit to discuss education issues and solutions with the Chicago School System, and established business, education advocacy, parent, and community groups. Evolving out of The Summit was a new organization called the Alliance for Better Chicago Schools (ABC'S), a coalition of nearly 40 community, parent, civic, and business organizations. ABC'S was convened by Chicago United, a business organization focused on solving urban problems, which since 1981 has been taking the initiative to make business and other parts of the Chicago community knowledgeable about local education issues and problems.

ABC'S, joined by many Chicago business leaders, lobbied for state education legislation that would make systemic organizational and management changes in the Chicago public schools.

Business leaders realized that only systemic change could help Chicago public schools. Although the lobbying effort was opposed by the Chicago Public School Board, no doubt the busloads of angry parents and the presence of some two dozen CEOs gave credibility to the proposed legislation and helped sway rural and suburban lawmakers. A compromise bill was signed by Gov. James Thompson. It authorizes:

- local school decision-making through the establishment of elected governance boards for all public schools
- school principals with hiring, supervising, and firing responsibility
- teacher and principal accountability measures which included performance evaluations and remediation
- equity in allocation of school resources
- downsizing of central administration staff
- establishment of an oversight authority to ensure that reforms are carried out
- appointment of a new board of education for the public schools

The new mayor, Richard Daley, has appointed the first deputy mayor for education and a new interim school board. Also, several of the major business organizations have formed a new partnership organization, called Leadership for Quality Education, whose main purpose is to aid the implementation of the changes authorized in the reform legislation.

The Chicago business community did take a risk. The business community, along with community groups, was able to influence the state legislature and governor to change the organization and management of the Chicago public schools. But it was a big risk and continues to be during implementation. Business needs to be willing to take risks with education as it does in business. Not every strategy works every time.

Business must also realize that a similar set of risks exists for an individual or group from inside the system that wishes to take the lead in restructuring. Educators and elected officials who advocate systemic change, too, go out on a limb and need allies. When those on the inside take the lead, it may cost them their jobs or elected or appointed positions. To obtain the needed systemic changes in education requires risk taking by many people and groups. It must be a joint venture or it cannot fully succeed.

Taking a "Lone Ranger" Approach

Most successful business involvement in education reform has been predicated on a collaborative process. Some businesses, however, prefer to act on their own, a trend seen in most "feel-good" partnerships. These partnerships have not changed policies or administration and practice although they can be useful in increasing the interest and involvement of business in education.

There are basically two types of "lone ranger" approaches, as the Alliance refers to them. The first is based on a decision by a business to work independently of other local- or state-organized business efforts. The second results from necessity in some communities where the company is the only major business in town. There are assets and liabilities to each, although generally, "lone ranger" approaches that do not involve broader participation have little or no impact in the restructuring of schools.

In the first approach, a corporation acts alone even though it is one of many businesses in a community interested in education reform. The individual company sets its own mission and priorities, and focuses its time and money in limited programs. This approach usually avoids organized efforts to make systemic changes. Examples of programs supported by this approach are: tutoring, scholarships, mini-grants, incentive and recognition awards, and equipment donations. These types of programs are important, but are generally short-term efforts that are often based on company promotion and instant gratification. These efforts generally tinker at the margin and affect only limited numbers of students and not the system.

The second "lone ranger" approach is born out of necessity. When a company is dominant in a community, it must either become the catalyst for smaller business involvement or exercise its clout alone to press for education reform. The company must take a leadership role to initiate and implement the building of a comfort zone; recruit other businesses and organizations to join the effort for education improvement and change; and use its political leverage to begin the dialogue for change. In essence the business underwrites the entire effort. This situation usually occurs in small towns or suburban communities where a large national or multinational corporation has a plant or headquarters. In this situation, over the long haul, many companies are able to establish a collaborative process.

General Electric As a Catalyst for Change

An example of the second "lone ranger" approach is the General Electric Foundation's efforts in a section of rural Alabama, where GE is the dominant employer. The foundation has committed money, time, and people to local schools and the communities. GE has taken the lead and has drawn other local employers, such as the phone company, into this endeavor. GE has made an effort to recruit new business into the area by setting aside land in its plant's industrial park. Without GE there would not be an extensive effort to significantly improve the quality of education for the children in the area, who are the potential future workforce for the company. GE has also built a partnership with Tuskegee Institute for a Saturday academy on math and science in the local schools. GE has further understood that to make fundamental educational changes, it needs to help out in such areas as housing, welfare, economic development, and local government. It is working on all of these fronts. General Electric initially acted alone because its size and resources could muster the political leverage and interest to be the catalyst for change. However, GE understood that it must have partners in this endeavor to succeed in improving education and the quality of life for the community.

Going it alone when there are others to work with can hurt efforts to change the education system. Such an approach diminishes resources—human, political, and financial. To maximize the effectiveness of business in restructuring, collaboration, alliances, and cooperation are vital tools. "Lone ranger" strategies can limit impact and minimize changes. A single company is rarely powerful enough to pursue these goals.

Recognizing Patience As a Virtue

Business leaders are bound to ask: "Why aren't we getting the results within the time frame we had expected?" No matter what the focus, no matter what the risk, in order to be effective in reshaping education programs, policies, and practices, business must learn to be patient.

"It is a trial and error process, sustained over time. There is no snake oil cure."
Paul Hill
Senior Social Scientist
RAND Corporation

It takes time to effect change and marked improvement in education. It will probably take at least several years. The effects of education restructuring are slower to realize than business restructuring. In part, this reflects the numerous people and parties that will need to be consulted and involved in the decision-making process. It also reflects the fact that student achievement, unlike product or service improvements, is greatly affected by the experiences of previous years. Overcoming such deficits cannot occur quickly.

Business needs to measure the quality and success of education reform in the same way it measures its research and development work. The petroleum industry drills many dry holes in exploring for fuel sources. Pharmaceutical companies take many years to develop the drugs that help cure disease or reduce pain. Patience is needed in assessing investment throughout the development process. Conclusions should not be drawn before an initiative has had ample time to be implemented. Education restructuring does not lend itself to short-term gain or gratification, although it helps to see some signs of success along the way. While accountability is important, business cannot expect significant changes in outcomes such as education achievement, dropout rates, administrative performance, or curriculum overnight.

If results are not forthcoming when expected, business needs to assess the situation with its partners, analyze the strategy, and make appropriate modifications.

Patience in Boston

Business leaders in Boston have shown patience and a long-term commitment to education improvement. In 1982, the Boston Compact was formed by leaders of the business community, the public schools, and the city government. The compact had lofty goals for both private job commitments and education improvement. The responsibility for job commitments was undertaken by Boston's private industry council (PIC). Additional agreements were signed with local colleges and universities in 1983 to accept more public high school graduates, and with Boston's building and trade unions in 1984 to recruit more graduates for apprenticeship programs. Business fulfilled its goal by giving qualified Boston high school graduates a hiring priority. This all but eliminated the unemployment gap between white and black youth in Boston. There was, however, a failure in the compact's primary goal—fundamental education reform.

It is premature to write the epitaph for the Boston Compact. After five years the Boston PIC concluded that a strong alliance had been established and some improvements had been made, especially in local employment practices. The Boston Compact Steering Committee, whose members include the mayor, superintendent of schools, and representatives of labor, business, and education, developed a new compact agreement that focused on making greater strides in education improvement. The steering committee felt that real progress had to be demonstrated before the new agreement would be signed by the business community. Before signing Compact II, the steering committee required an indication of good faith on the part of the education system. This was accomplished by including in the teachers' new collective bargaining agreement, school-site management, and approval by the Boston School Committee to a new school assignment process that offers parental choice. In addition to these two new goals, the agreement included the original education goals of reducing dropouts and increasing test scores; specific milestones for each goal; and expansion of the compact to grades K through 12 in recognition of the fact that real educational reform must occur in all grades. Compact II was signed in spring 1989 after several months of discussions and negotiations.

The Steering Committee will also establish an oversight subcommittee to report quarterly during the first year of the new agreement and annually thereafter on the progress being made on the new goals. The business community has established a permanent endowment of $20 million, the Boston Plan for Excellence in the Public Schools, which will fund various programs that focus on the education improvement goals of Compact II.

This type of patience and continuing commitment by all of the compact signers has ensured the continuance of the alliance and further progress toward improvements and changes in public education in Boston.

The lesson to be learned from Boston's experience is obvious—changes require a long-term commitment of support and interest to pay a dividend on business' investment.

Business must also be prepared to compromise. Not everything that business or its coalition proposes will be acceptable to educators, elected officials, or unions. Therefore, business must be willing to negotiate, to develop the best possible solutions.

Formalizing the Business Commitment

A key ingredient to ensure long-term business participation in education reform is institutionalization of the company's activities within its organization and management. To make a difference, business needs to commit to years of involvement and participation. Education restructuring is a dynamic improvement process comparable to productivity and quality improvement efforts in business.

Setting a company's role and mission in education reform is crucial. It requires the involvement and decision-making of the CEO. Recommendations may come from staff based on their experiences, but the direction a company takes must be decided by its ranking officer and transmitted throughout the organization. Without the involvement and commitment of the CEO the company's participation will eventually flounder from lack of support.

The CEO should consider appointing a senior manager to a position analogous to vice president for education. This person, the surrogate for the CEO, will ensure that the company becomes knowledgeable on the issues, takes a position, develops institutional policies, and takes action. It is important that this person be seen as one of the company's key managers who is either expected to be or already is part of the company's top leadership. The assignment should have a specific length of time, but the position should be permanent to ensure a long-term commitment.

"The institutionalization process applies in two areas: first, in the creation of an organization in the community to formally conduct the business-school partnership; and the second, in the formal establishment of an involvement in education as a policy or mission of the company. . . ."
Beyond Business/Education Partnerships
The Conference Board

The two reasons for institutionalizing a company's commitment are:

- Changes in leadership at the top of major corporations occur. Inconsistent participation with the schools over time can be disappointing and frustrating to both educators and company employees. Trust erodes, and company involvement often diminishes.
- Changes in the bottom line often force a company to withdraw its support and involvement. Hard times will reduce or eliminate participation. Usually the first items to be cut in any business are those that do not visibly contribute to the profit line. A clear commitment from top leadership to education as a long-term investment may mitigate against, although not necessarily prevent, this outcome.

There are ways to ensure continued involvement within the corporation by institutionalizing the various education investments it has made. A few ways to institutionalize the policies and facilitate involvement are:

- **Establish policies and practices that encourage and support employee involvement in education efforts.** Loaned executive programs should be a component of professional development programs, not a dead-end. Release time should be an option for employees who are willing to have flexible schedules. Performance appraisals should include an objective on outside civic activities that recognize these activities, and employees should be rewarded or recognized for their efforts. Each involvement lends visibility and credibility to the company's image in the community.
- **Offer benefits that promote the importance of the education of employees' children.** Benefits might include policies that increase parental involvement in a child's education, including release time for teacher conferences at school or for serving on civic boards. Other benefits might include financial subsidies to employees for day care and early childhood learning experiences. Some companies have established public schools on or near their worksites. These policies improve not only work conditions but also the level of cooperation and participation from employees.

- **Commit money, people, and time to both short-term and long-term education projects.** Companies may make funds available for employee volunteer education projects or set aside money for long-term commitments such as scholarships, education improvement, and incentive awards. Companies should encourage senior management to serve on blue-ribbon state and national panels and committees, even if it means hiring additional staff to free executives for those activities.

Each of these steps sets a tone for involvement and shows the community that the company is commited to systemic change and participation over the long term in education restructuring. These policies and practices set a precedent within the business and improve morale among its employees.

> ***"Business needs to encourage its employees to work in education and provide incentives."***
>
> *David Ziska*
> *Director of External Programs*
> *Southern Area*
> *IBM*

Institutionalizing Involvement at Boeing

During the tenure of Boeing Corporation Chairman T.A. Wilson as chair of The Education Committee of the Washington Roundtable, the firm undertook a study of its involvement in public education. The study's final report made recommendations for instituting corporate policy to encourage involvement in education. As a result, Boeing:

- Changed corporate policies that previously hindered better relations with the public schools. One specific policy changed Boeing's institutional giving pattern, directing funds to public schools, and not solely to higher education institutions.
- Established policies that fostered employee involvement. Policies were revised to encourage "Executives in Education" programs at all Boeing facilities. Executives were encouraged to work in local schools and school systems. On the corporate level, a new budget policy was instituted to incorporate the time spent working as a consultant to the schools. Education managers were established at every facility who, on average, spend 50 percent of their time working with schools.
- Communicated in writing to all corporation division presidents that they should become involved at the local level and put time into helping school districts.

After Mr. Wilson retired, Frank Shrontz, the new chairman and CEO, stated in a memo that the policy and commitment to education was to be continued.

CONCLUSION

Many people believe that the current cycle of reform in American education is just another fad. It seems that we readily take up the gauntlet for each new initiative that promises to improve the quality of education. The restructuring of education could easily become a fad, as educators, and particularly non-educators, grow tired of the constant pressure for change and innovation without significant results. Business leadership cannot allow this to happen.

Business must work not only at the state and local level, which is the focus of ***A Blueprint***, but it has a responsibility to ensure that education is placed high on the national agenda as an issue that must be addressed for the future of our society.

Like most large institutions, education is not likely to reform itself and is less likely to do so at the most efficacious pace possible. It will need assistance, if not insistence, that change take place.

The responsibility for ensuring that restructuring is not a fad but a reality lies in part with this nation's business leadership. On the state and local level, business has much to offer the public education system. Once convinced of the quality of restructuring plans, business can support schools to improve management, planning, accountability, curriculum, instruction, linkages to social services, and staff development. Business can become a vital advocate for public education. But this will not happen unless business people become a part of the analysis and decision-making process.

For this to occur, educators must more actively engage business in joint ventures. And business leaders and their companies must be prepared to make long-term commitments.

"Most business people are totally unaware of the potential problems that the failure of urban education can cause them in the future."

Vaughn Beals
Chairman
Harley-Davidson, Inc.

Business people must understand three critical points:

Business must recognize that the crisis in American education is critical to them. The workplace of today and tomorrow demands more from the schools. In the long run education will affect business' bottom line. If employers recognize the seriousness of the crisis, then there is no question that they must participate in reshaping our nation's schools and school systems.

Business people must learn about the business of education if they expect to make strong, viable recommendations that will be adopted by educators and elected officials. They must take the time to build a base of knowledge and understanding of the issues and the people involved in the system, just as they would require of any management consultant. Without that understanding business cannot play a meaningful role.

Business people must see their connection to education as an ongoing, long-term effort. While the nature of the issues will change over time, business people should see partnerships with the schools as a part of doing business. Our society and economy are in an era in which many of our institutions are interdependent and will continue to be. Responding constructively to this inter-dependency calls for enlightened leadership and vision that begins with a company's chief executive officer and involves employees at all levels of the company.

The common denominators we have found (see below) in places where business people and educators have begun to focus on school restructuring reinforce these three points. The learning process (building a comfort zone) is best done jointly, and just as important are the new collaborations, alliances, or joint ventures that follow. These ventures demand new kinds of compromise and accommodations among institutions and sectors.

Common Denominators

The Alliance has found these common elements emerging in successful business/education collaborations:

- Business leaders coalesce to work together, not unilaterally, for education reform.
- An institutional structure, such as a civic organization, chamber of commerce, or private industry council, builds local business and community commitment, and keeps the momentum going.
- Educators, local elected officials, and business act jointly. One missing player can compromise the chances for success.
- Business people, often in concert with educators and others in the community, build a "comfort zone" early through a concerted effort to understand education issues, problems, and structures.
- The partnership develops a plan with measurable goals and milestones.
- Educators and business people work to build trust and credibility with each other.
- All players make a long-term commitment. Patience is required.
- All educators take business' ideas and recommendations seriously. Either formally or informally, business people participate in decision-making on education, but while business may prod, it does not try to take over the educators' lead role.

"Business leadership must take a more active role in implementing an effective national education reform program. We have a considerable stake in education, since its success is a principal factor shaping the character of this country and our future workforce."

John Carter
President and CEO
The Equitable Financial Companies

There is no magic bullet. Each enterprise of change, whether on the national, state, or local level, requires the knowledge and understanding of the personalities, politics, bureaucracy, and needs of each community. A team approach comprised of all sectors brings the required human, technical, and financial resources together to address the needed systemic educational changes.

We need to rely on our American ingenuity to improve and reshape education. It is up to business people, governors, state legislators, chief state school officers, parents, teachers, administrators, board members, and the community at large to face the challenge of making the public education system more productive for this nation's future needs. The purpose of schooling is not solely to prepare a workforce but also to foster learning that enriches all people and helps them flourish and function intelligently. If we are successful in doing this, then we will have shaped tomorrow's workforce into an enlightened and productive citizenry.

Appendix A

Persons Interviewed

To collect information for this report, Alliance staff, Frederick S. Edelstein and Esther F. Schaeffer, made site visits and interviewed numerous persons involved in various aspects of education reform. The following is a list of those interviewed during the project.

Florida

Joseph Fernandez, Superintendent of Schools, Dade County Public Schools
Joseph Teckerman, Executive Assistant to the Superintendent, Dade County Public Schools
David Ziska, Director of External Programs-Southern Area, IBM
Philip J. Sharkey, Senior Vice President for Human Resources, American Bankers Insurance Group
Joseph Alfano, Executive Director, Private Industry Council of South Florida
Larry Adams, Vice President for Economic Development, Florida Power and Light Company
Linda Lecht, Executive Director, Dade Public Education Fund
John Ruffin, Jr., President, SUNAO Broadcasting Company
Richard Clark, President, Greater Fort Lauderdale Chamber of Commerce

New York, New York

Leonard Lund, The Conference Board
Dale Mann, Professor, Teachers College, Columbia University
Laurie Miller McNeill, National Center on Education and Employment, Columbia University
Sue Berryman, National Center on Education and Employment, Columbia University
P. Michael Timpane, President, Teachers College, Columbia University
David Ford, Chase Manhattan Bank Foundation
Andrew Fisher, Chase Manhattan Bank Foundation
Hildy Simmons, Vice President for Urban Affairs, Morgan Guaranty Trust Company
Richard I. Beattie, attorney and former member, New York City Board of Education
Sandra Kessler Hamburg, Committee for Economic Development

Rochester, New York

Marc Tucker, President, National Center on Education and the Economy
Adam Urbanski, AFT Vice President, Rochester Federation of Teachers
William Johnson, President, Rochester Urban League
Peter McWalters, Superintendent of Schools, Rochester Public Schools
John D. Hostutler, President, Industrial Management Council
Jay Flickinger, Executive Director, Rochester Brain Power
James Winston, President, Rochester New Futures Inititative
Robert Volpe, Chairman, Rochester Private Industry Council, and Kodak
Loretta Bowman, Assistant City Commissioner, Rochester
Mark Blazey, Dean for Training and Professional Development, Rochester Institute of Technology

South Carolina
Terry Peterson, Executive Director, Joint Business/Education Committee
Ellen Hayden, Coordinator of Business Education Partnerships, South Carolina State Department of Education
The Honorable Richard Riley, former Governor of South Carolina
John Lumpkin, Sr., former CEO and Chairman of the Board, NCNB
James Wilsford, Superintendent of Schools, Orangeburg, South Carolina
William Page, Executive Vice President, U.S. Shelter Corporation
Mary Jackson Willis, Executive Assistant for Education to Governor Campbell

Atlanta, Georgia
Ron Lewis, Deputy Superintendent of Schools, Atlanta Public Schools
Larry Lowenstein, Executive Director, Atlanta Partnership
Lon Crim, former Superintendent of Schools, Atlanta, and Professor, Georgia State University

Minnesota
Sandra Peterson, President, Minnesota Federation of Teachers
Ruth Randall, Commissioner of Education, Minnesota
Ted Kolderie, Humphrey Institute, University of Minnesota
David Koch, CEO and Chairman of the Board, Grayco Inc.
John Cairns, attorney and former Executive Director of the Minnesota Business Partnership
Senator Ember Reichgott, Member of State Senate Education Committee, Minnesota State Legislature
Jan Hively, Minneapolis Youth Trust
Curtis Johnson, Executive Director, Citizens League
Joe Nathan, Humphrey Institute, University of Minnesota
Peter Hutchinson, Vice President for External Affairs, Dayton Hudson Corporation
Robert Astrup, President, Minnesota Education Association
Walter Munsterman, Vice President, Minnesota Education Association

Chicago, Illinois
David Paulus, Senior Vice President, The First National Bank of Chicago
John Ayers, The Civic Committee
Pat Keleher, Director of Public Policy, Chicago United
Elynor Williams, Director of Public Affairs, Sara Lee Corporation
Joe Kellman, President, Globe Glass and Mirror, and founder of the Corporate Community School
Tom Corcoran, Secretary of the Chicago Board of Education
Don Moore, Designs For Change
Larry Freeman, Dean of Education, Governors State University
Herbert Walberg, Professor, University of Illinois at Chicago
Gene Cartwright, Manager, Community and Urban Affairs, Amoco Corporation
Lourdes Monteagudo, Deputy Mayor for Education, City of Chicago

Milwaukee, Wisconsin
Susan Phillips, Executive Director, The Greater Milwaukee Education Trust
Vaughn Beals, Chairman of the Board, Harley Davidson Inc.
Jean Tyler, Executive Director, Public Policy Forum
William Randall, Executive Vice President, 1st Bank of Milwaukee
David Bednarek, reporter, *Milwaukee Journal*
Robert Peterkin, Superintendent of Schools, Milwaukee Public Schools
Joyce Mallory, Member of the Milwaukee Public School Board of Education
James Forbes, President and CEO, BadgerMeter, Inc.

Other Interviews
Michael Cohen, National Governors' Association
Denis Doyle, Hudson Institute
David Mandel, National Board for Professional Teaching Standards
Gary Walker, Public/Private Ventures
Susan Fuhrman, Center for Policy Research in Education, Rutgers University
Peter Goldberg, Institute for Educational Leadership
Vivian Kidd, Executive Director, West Virginia Education Fund
Marsha Levine, American Federation of Teachers
Susan Otterbourg, consultant
Daniel Merenda, National Association of Partners in Education
David Hornbeck, partner, Hogan and Hartson
Gordon Ambach, Council of Chief State School Officers
Paul Hill, RAND Corporation
Art Wise, RAND Corporation
John Chubb, Brookings Institution

Appendix B

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Headquarters

National Alliance of Business
1201 New York Avenue, N.W.
Suite 700
Washington, DC 20005
202/289-2888

Regional Service Offices

New England
Joseph Fischer
Regional Vice President
20 Walnut Street
Wellesley Hills, MA 02181
617/235-1332

Atlantic
Fred Radlmann
Regional Vice President
317 George Street
New Brunswick, NJ 08901
201/524-1110

Southeast
William Walker
Regional Vice President
100 Edgewood Avenue
Suite 1800
Atlanta, GA 30303
404/522-9350

Central
Henry McHenry
Regional Vice President
9400 North Central Expressway
Lock Box 167
Dallas, TX 75231
214/373-0854

Midwest
Vince Serritella
Regional Vice President
11 East Adams
Suite 1008
Chicago, IL 60603
312/341-9766

Western
Janet Keyes
Regional Vice President
350 Sansome Street
San Francisco, CA 94104
415/391-4061

Victor Munoz
Area Vice President
Los Angeles Satellite Office
900 Wilshire Boulevard
Suite 840
Los Angeles, CA 90017
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Area Vice President
427 Skinner Building
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Chairman and CEO,
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